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ABSTRACT

One of the strategies that researchers have adopted for coping with anticipated suspicion and resistance among low-income respondents is the employment of interviewers who are like the respondents in race/ethnicity and SES. Surveys that employed them tended to have larger samples, larger proportions of low-income respondents in the sample, and shorter and less complex interviews. In reply to the questionnaire reported in this study, about half of the 194 surveys of the poor conducted in 1967-71 employed such interviewers ("indigenous interviewers"). For most of the 12 interviewing tasks queried, ratings of interviewer performance were lower for indigenous interviewers than for interviewers matched only on race or on neither race nor class. They were rated about as well as others on establishing rapport, contacting respondents, and locating the hard to reach. More intensive training and supervision of interviewers did not appear to affect assessments of performance. Directors of one-fourth of the surveys reported that they would definitely want to employ interviewers similar to respondents in SES in future surveys of the poor. Adherents of SES matching tended to be those who had employed them on the present study, and who further had actively recruited them, had employed a higher proportion of them and, to a lesser extent, were more satisfied with their performance. (Author/RJ)

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PRACTICES OF RESEARCH ORGANIZATIONS IN SURVEYS OF THE POOR

Carol H. Weiss, Laurie J. Bauman, Theresa F. Rogers
Bureau of Applied Social Research
Columbia University

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PRACTICES OF RESEARCH ORGANIZATIONS IN SURVEYS OF THE POOR

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ABSTRACT

One of the strategies that survey researchers have adopted for coping with anticipated suspicion and resistance among low-income respondents is the employment of interviewers who are like respondents in race/ethnicity and socioeconomic status ("indigenous interviewers"). About half the 194 surveys of the poor conducted in 1967-71 (replying to our questionnaire) employed such interviewers. Surveys that employed them tended to have larger samples, higher proportions of low-income respondents in the sample, shorter and less complex interviews. No differences emerged between surveys with and without indigenous interviewers on the reported receptivity of respondents to being interviewed, survey completion rates, or concern about the safety of interviewers. Contrary to expectations, relatively few surveys found any of these factors a serious problem.

For most of the 12 interviewing tasks queried, ratings of interviewer performance were lower for indigenous interviewers than for interviewers matched only on race or on neither race nor class. They were rated about as well as others on establishing rapport, contacting respondents, and locating the hard to reach. When they were high school graduates and/or had previous interviewing experience, their ratings were higher, particularly on interviewing techniques (following interview specifications, asking questions, probing, recording answers) and work habits (doing interviews punctually, reporting in, submitting forms). More intensive training and supervision of interviewers did not appear to affect assessments of performance.

Directors of one-quarter of the surveys reported that they would definitely want to employ interviewers similar to respondents in socioeconomic status in future surveys of the poor. (This compares with 85% who would unconditionally match by race/ethnicity.) Adherents of socioeconomic matching tended to be those who had employed them on the present study, and who further had actively recruited them, had employed a higher proportion of them and, to a lesser extent, were more satisfied with their performance.

PRACTICES OF RESEARCH ORGANIZATIONS IN SURVEYS OF THE POOR

INTRODUCTION

Background

From the late 1960s on, there was a striking increase in interview surveys with low-income people in the United States. With the plight of the poor a significant item on the political agenda, the need for information about them -- their attitudes and opinions, life styles, behaviors, conditions, responses to program endeavors -- increased, and research organizations throughout the country undertook studies based on personal interviews with poor people.

Such an undertaking is not without its hazards and concerns. Researchers have had enough previous experience, both with general populations and with low-income respondents, to recognize the lurking threats to response validity in survey interviewing. When the respondents are poor, often from racial or ethnic minorities, with a history of exploitation and suspicion, the limitations of survey interviewing are likely to be magnified.

Over the past decade, many problems have been identified in the conduct of surveys with the poor, some of them similar in kind to the difficulties of interviewing any respondent group but enlarged in scope, some of them unique to the special conditions of the poor in American society (Weiss 1966). The identification of problems has emerged not from systematic research but rather from the day-to-day travail of research directors and field supervisors; some of their reports have been formalized in professional articles (e.g. Josephson 1970, Friedlander 1970, Schwartz 1970), but most of the discussion has been "corridor talk."

The main difficulties have involved making contact with low-income respondents and convincing them to grant an interview and once this is done, securing complete and accurate answers to survey questions. The sources of resistance have been variously hypothesized: contact is difficult because poor people are transient, they are afraid to open the door in crime-ridden neighborhoods, they are unreceptive to research for which they are the "guinea pigs," they have been "studied to death," interviewers are not persistent in tracking respondents in unpleasant surroundings and give up easily. Lack of effective communication, with a high rate of "don't know"or "refuse to answer," has been blamed on difference in language, styles of speech, and conceptual modes, poor people's unfamiliarity with

research and the role of survey respondent, their lower educational level, their suspicion of the interviewer and her purposes, the irrelevance of research to their lives, or interviewers' inability to make connection with and understand them. Invalid reporting is sometimes viewed as more likely from low-income respondents because they show deference to the higher-status interviewer, try to give a more socially desirable impression than "facts" warrant, conform to the interviewer's perceived expectations, try to con the interviewer, or because the interviewer misunderstands or fails to work hard enough at the interview.

Out of the plethora of reported problems -- and the somewhat contradictory reasons posited for them, there emerged in the late 1960s a sense that the "social distance" between respondent and interviewer was a key to the trouble. Accordingly, the idea of using interviewers who were similar to the respondents gained considerable acceptance.

It has long been a tradition in survey research to employ interviewers of the same race, particularly black interviewers for black respondents. This development grew out of the common sense interpretation of racial cleavage, buttressed by research findings that many black respondents gave different answers to white and black interviewers. Studies going back to the late 1930s indicated that blacks displayed more "acceptable" opinions, lower knowledge, and less anger and militancy when interviewed by whites (Stouffer et al. 1950, Hyman 1954, Price and Searles 1961, Pettigrew 1964, Lenski and Leggett 1960, Williams 1964, 1968; for overview, see Weiss, Bauman, and Rogers 1971). While the realities of the American experience have changed over the years, with blacks increasingly willing to voice nonconformist opinions and militant views to whites, the latest experiments indicate that there is still some dissembling to white interviewers, particularly among blacks of lower socioeconomic status -- although on a much narrower band of issues than before (Schuman and Converse 1971, Schuman 1972). Evidence that similar misreporting occurs in situations of class difference is sparse (Katz 1942), but there seemed reason to try socioeconomic matching of interviewers in studies of the poor to bridge whatever gulf such difference introduced.

The use of poor people as interviewers was further encouraged by the desire to give jobs to people in need. Since much of the support for

surveys came out of money designed to help the poor, there was a sense of obligation to use some of the funds in direct job-making. Furthermore, some low-income communities were becoming highly resistant to "research" that seemed to be replacing action, and organized and unorganized groups were counseling non-cooperation with outside researchers. To overcome resistance to surveys, use of local interviewers seemed a useful step.

For a variety of reasons, then, researchers began to employ interviewers who were similar to respondents in both race or ethnicity and socioeconomic status. It was not long, however, before groans came filtering through the informal communication channels: the use of poor people as interviewers raised new difficulties. Some of the complaints were that they were unreliable employees, they didn't do their assignments promptly, they quit without notice, and even that the quality of the interviews they completed was lower than expected because of their limited skills in writing and recording. On the other hand, some researchers passed on glowing reports of their performance (e.g. Weinberg 1971). It seemed likely that much of the difference in experience was due to the ways that research directors trained and supervised the new breed of interviewer.

Purpose of this study

This study was undertaken to find out more about the benefits and limitations of employing racially and economically similar interviewers in surveys of the poor. What were the advantages and disadvantages: did they do better at locating respondents? Were they less conscientious about punctuality? And what conditions and procedures were associated with better performance?

If study directors kept detailed records, we would have liked to compare interviewers who were similar to low-income respondents in race and socioeconomic status, interviewers who were similar only in race, and interviewers who were dissimilar, and analyze differences on such factors as turnover (dropout) rate; contact rate, i.e. percentage of eligible respondents reached; completion rate, i.e. percentage of eligibles who were interviewed; error rate, i.e. number of missing answers, inconsistent answers, nonresponsive answers, etc. per interview; supervisory ratings

of performance; response reliability, i.e. any measure of consistency between responses in the interview and in a validation follow-up or re-interview; validity, i.e. any measure of consistency between interview responses and data in records or outside sources. Hopes of locating such data, we knew, were unrealistic given the conditions under which fieldwork is done and the press of completing interviews in a limited time period; record-keeping of this kind is an expensive and unnecessary frill. But we quickly learned that hopes even for minimal quantitative information were extravagant; such items as number of interviewers recruited or number who stayed until the end of fieldwork were not always recorded and were hard to figure out in cases where interviewers came and went at a lively clip. The 38 exploratory interviews that we conducted with directors of surveys of the poor indicated that we would have to rely heavily on estimates and best judgments.

Our questionnaire, born out of a compromise between what study directors knew and what we wanted to find out, therefore retains the focus on the performance of different types of interviewers, and the conditions (particularly training and supervisory procedures) associated with performance, but the measures tend to be judgmental rather than objective. Wherever possible, we secured quantitative data, often at the expense of a high rate of "don't know." To the extent that the study directors and field supervisors who answered the questionnaire based their responses on first-hand knowledge and experience, we have useful information on how different procedures of interviewing work in obtaining representative, complete, and valid survey responses from the poor.

Locating surveys of the poor

Since there was no list of researchers who had conducted interview surveys of low-income populations, our search for appropriate informants took multiple routes. We started with researchers whose work in surveying the poor we knew about either through personal contact or through their publications. We combed the journals for reports of relevant studies. We distributed screening questionnaires at the annual meeting of the American Association for Public Opinion Research (AAPOR) to obtain names of survey researchers whose studies had included sizable numbers of

low-income respondents. Staff spent a day at the O.E.O. library in Washington, locating reports based on interview surveys. We activated the "invisible college" of people in the field to obtain names of prospective informants. All people who had requested reprints of Weiss' previous papers on interviewing the poor were circularized, as was the membership directory of AAPOR, staff of government agencies that did research or gave grants for research that might involve low-income respondents, and researchers who had served with action agencies in the poverty field.

From this initial cut, we contacted 55 research organizations by phone, most of them in New York City, to arrange for personal interviews. Since our major interest at this point was with studies that had used "indigenous" interviewers, i.e. interviewers similar to the respondents in both race/ethnicity and socioeconomic status, we interviewed only study directors who had used interviewers of this type. Thirty-eight interviews were held and the results of this pilot phase are reported in the progress report, "The Use of Indigenous Interviewers in Survey Research," Bureau of Applied Social Research, June 1971. As well as substantive information on their experience, the interviewees also gave further leads to researchers who had experience with low-income surveys.

At this point we decided not to pursue commercial surveys, i.e. surveys dealing with marketing and media, because (a) the commercial researchers interviewed generally delegated field work to local supervisors and did not have direct knowledge about recruitment, attrition, training, supervision, or interviewer performance and (b) the nature of their relationship to their clients often made them reluctant to give information about clients' studies. Therefore, we continued to search for and include profit-making research organizations only if their surveys dealt with social scientific issues. Commercial groups engaged in this type of inquiry, often with government support, were much more similar in knowledge and cooperation to the other research groups (university research center, faculty group, non-profit research institute, action agency, government agency) in the study.

We mailed screening questionnaires to the entire list we had assembled by this point, and to government agencies that gave grants for research that might include low-income respondents. The screening form asked:

1. Within the last four years, have you done research in the United States that included survey interviews with low-income or welfare or minority group respondents? (If yes, we asked for title of the study(ies), number of respondents interviewed, name and address of study director, name and address of field supervisor.)

2. Can you tell us of any individuals or organizations which have conducted research of this kind within the last four years?

Names that came in in response to the second question were also sent screening forms. We continued to seek appropriate names at meetings and conferences, e.g. the annual Field Directors Conference, the Interview Methodology Conference at Ann Arbor, the American Statistical Association sessions on interviewing. By late fall of 1971, we had a list of 391 individuals who reportedly had conducted 479 studies that met our criteria. Questionnaires were mailed for each study.

It turned out that not all the nominees were eligible for inclusion. Thus, 52 questionnaires were returned with the notation that the study either had not interviewed low-income people, had not involved in-person interviews, or had not used interviewers other than the research director(s) themselves. Eleven questionnaires were duplicates, either sent to different people for the same study or sent to one person for what we had thought were different studies but which turned out to be one study. These three conditions account for 74 people and 94 questionnaires.

Of the remaining 317 researchers who had received 385 questionnaires, 133 people (136 questionnaires) never responded to the screening form (or to the questionnaire, the follow-up questionnaire, or the two post card follow-ups). How many of them had actually conducted studies that were eligible for inclusion, we do not know. Seventy-five people in this group had been nominated by others on the screening form.

Four people (who had received six questionnaires) refused to answer the questionnaire. They so stated either in the return of a follow-up post card or in answer to a phone follow-up. Twenty-four people (38 questionnaires) reported that they had done a relevant study or studies on the screening form but did not return any of the questionnaires. Five people returned at least one questionnaire, but did not return questionnaires for 11 other studies. Thus, no data were received on 55 confirmed-eligible studies.

The final count of usable questionnaires was 194, returned by 151 informants. Of these, 122 people completed one questionnaire, 20 completed two, 7 completed three, 1 completed five, 1 completed six.

How good are researchers as respondents? Probably no better than anyone else. Somewhat over half of them returned the questionnaires, whether or not their studies were eligible for inclusion. This is very similar to the response rate that the Carnegie Commission survey received from professional research personnel at universities. They report that 51% of the researchers sent back questionnaires (Trow et al. 1972).

Of the universe of surveys of the poor, 1968-71, what proportion are represented in our study? We don't know. Despite our aggressive search, we may well have missed studies. Of the studies we heard about, 20 per cent definitely did not meet criteria for inclusion; we have no information for 28 per cent; 11 per cent met the criteria but were not reported. Our response rate, figured on the base of all possibly eligible studies about which we learned, is 50 per cent; figured on the base of all confirmed-eligible studies, it is 78 per cent. Our estimate is that we were most likely to hear from larger studies, from studies conducted by established research organizations or by well-known university faculty members, and studies supported by government funds.

In presenting the responses to the questionnaire, we generally report the significance level of chi square (a measure of independence) and, for ordinal variables, the value of gamma (a measure of association) as well. Inasmuch as the responses are not derived from a random sample but from self-selected members of the universe, and represent a large part of that universe, the use of statistics deserves comment. If we simply wanted to describe the experience of directors of surveys during 1967-1971, there would be little point in significance tests. However, if we want to generalize to a broader time period, to the universe of studies that might be carried out, we need some sense of whether the relationships found here are likely to be stable and to affect the conduct of surveys in the future. Therefore, we need some measure of whether a given relationship could easily have arisen by chance and some sense of the strength of the relationship. Of course, since historical situations and passing ideologies may influence human behavior,

generalization of these results may not be useful beyond a certain historical period.

Acknowledgements

We wish to thank the busy study directors and field supervisors who took the time to complete the questionnaires for this study. Many of them helpfully sent additional information on their studies and interesting comments and explanations about their experience. We also would like to thank the study directors who participated in the pilot interviews, the many people who put us on the track of surveys that should be included, and those who (at the risk of losing friends) nominated researchers to receive questionnaires.

Thanks go, too, to Michael Freeman who handled the computer work for our analysis.

CHARACTERISTICS OF SURVEYS THAT PROVIDED INFORMATION

We asked a number of questions about the surveys that interviewed low-income respondents in the period 1967-71 and we present this descriptive material in some detail for two reasons. First, the presentation serves the obvious purpose of providing the background and imagery of the studies: what they were for, how large they were, in how many cities, etc. With this background, subsequent information about the use of interviewers can be seen in situational context. Second, and this was not part of our original intent, the questionnaire responses provide quantitative data on the kinds of survey research done with poor people in the heyday of the War on Poverty. Although we do not have a complete census, we have probably the best data available. Writing in 1973, when governmental attention to issues of poverty and race is waning, we see these data as informative, historical material about a period that appears to be (at least temporarily) phasing out.

Purpose. The 194 surveys about which we received reports were conducted for a variety of purposes. These include:

attitude surveys	28%
evaluations of programs	26
surveys of community conditions	21
behavioral surveys (e.g. use of health services)	6
census of an area	5
multi-purpose	10
other (e.g. methodological investigation)	4
	100%

N=194

Main topic. Work was the most frequent topic under investigation. Twenty-five per cent of the surveys focused primarily on aspects of employment and unemployment. Almost as many (22%) concentrated on the community, including physical conditions and psychosocial conditions. Third in frequency was health; 17% of the studies had health as the main topic. Marriage and family relationships was the primary concern of 5% of the studies, and smaller numbers focused on education, public assistance, political behavior, drug abuse, etc.

The questionnaire asked whether the interview included "questions on particularly sensitive topics (e.g. racial attitudes, use of addictive drugs)." On 35% of the surveys, the researchers said there were practically no sensitive questions and on 50% there were "a few" such items; only 15% of the studies had "many." When asked what the sensitive topics were, the subject that they were most likely to mention was income (reported by 50% of the studies with any sensitive questions). Other subjects reported were racial questions (38%), personal relationships (30%), crime (19%), sex (18%), and a variety of others, from education to household repairs. (The total equals more than 100% because of multiple answers.)

Research group. The research group or organization that had overall responsibility for the study can be classified in several ways: by its permanence, by university or non-university affiliation, by profit or non-profit status. Most of the studies (63%) were conducted by an ongoing research organization, 20% by government agencies with regular research staff, and 17% by an ad hoc group specifically assembled for the study, usually headed by a university faculty member. Almost half of all the studies (46%) were conducted under university auspices, 30% by university research institutes. Non-profit research groups not affiliated with universities ran 16% of the studies; profit-making firms conducted 18%. (Note that our study-selection procedures concentrated on social science research and eliminated purely commercial studies.)

On three-quarters of the studies, the research group did its own field work; 25% contracted out the field work either to one interviewing organization, such as the National Opinion Research Center, or to a set of independent field supervisors who recruited, trained, and supervised the interviewers in their own communities. The informant who completed our questionnaire was usually either the field director directly in charge of the interviewing on the study (40%) or the study director (38%) who on smaller studies often supervised the field work himself. Other informants identified themselves as "principal investigator" (7%), assistant study director (5%), or by other titles, such as administrator, financial officer, consultant (10%). To jump a bit ahead of our story, there were almost no differences in response to questions on interviewing

practices by the position that the informant held on the study. In a number of cases, it is clear that whoever signed our questionnaire, it was filled out by collaborative enterprise among the staff.

Which groups conducted which kind of study? There were few differences among university, non-profit, and profit-making groups in type of survey (evaluation, attitude, etc.). Government research units, however, tended to specialize in attitude surveys and to do few evaluations.

Type of survey	University institutes and faculty	Non-profit organizations	Profit firms	Government agencies
Program evaluation	30%	34%	34%	3%
Community conditions	24	22	17	14
Attitudes	19	25	23	59
Behaviors	9	6	3	3
Multi-purpose	12	9	14	-
Census and other	6	3	9	12
	100%	99%	100%	101%
	(90)	(32)	(35)	(37)

N=194

Source of support. Federal government funds supported most (84%) of the studies of the poor, and government contracts were much more prevalent than government grants. This suggests that they were designed for programmatic or policy action more than for increasing fundamental understanding. Of the 194 studies, 45% were conducted under government contracts, 23% under governmental grants, 16% through use of the government agencies' own funds, 6% under foundation grants, 2% through state or local government support, and 8% with other funds (e.g. the organization's own funds).

The source of funds varied by the type of organization doing the survey. University-based research groups were more likely than other organizations to have attracted grants for their surveys, but even academic surveys were more commonly supported by contract. Non-university groups, especially those that were profit-making, relied heavily on contract funds.

Source of funds	University	Non-profit	Profit	Government
Government contract	44%	50%	77%	14%
Government grant	38	22	9	-
Government agencies' own funds	-	-	-	84
Private foundation	7	19	-	-
Other	11	10	14	3
	100%	101%	100%	100%
	(89)	(32)	(35)	(37)

N=193
NA= 1
194

Respondents. Of the 194 studies, 145 reported on the income status of the survey respondents. One-third of these reported that 95% or more of their respondents were low-income people. In another one-third of the studies, 50-94% of the respondents were low-income, and in the final one-third, poor people comprised less than half the sample. We asked their definition of low income. The most frequent definitions were: resident in a poverty area, welfare recipient, income at or below the OEO-defined poverty level (which takes family size into account), participation in a poverty program, income of $4,000 or less, income of $5,000 or less, income below a ceiling higher than $5,000, unemployed.

One hundred sixty-eight studies reported on the race and ethnicity of survey respondents. Almost two-thirds of these (63%) classified their respondents as "all" or "most" of one racial or ethnic group - 41% black, 14% white (non-Spanish), 4% Chicano, 1% (2 studies) American Indian, 3% other. The remaining surveys interviewed mixed populations with no one group predominating; in 20%, the respondent population was composed primarily of a combination of ethnic minorities; in the other 17%, whites and minorities were about equally represented.

When we look at the racial/ethnic background of any respondents in the survey, we find that at least some blacks were interviewed in 92% of all surveys, whites in 85%, Puerto Ricans in 38%, Chicanos in 32%, Orientals in 24%.

Women were slightly more likely to be interviewed than men. Only one study in ten interviewed members of one sex only and these were evenly divided between all-female and all-male studies. But women comprised "most"of the respondents in 25% of the surveys, whereas men were "most" of the respondents in 11%.

Most surveys covered a wide age range. Five per cent of the studies were restricted to youth under 21 years old, 4% interviewed only persons 65 or older. At the other extreme, 17% of the studies had no respondents under 21; 30% had no respondents 65 or older.

Type of sample. The two most common sampling procedures were random selection of households (45%) and sampling from a list of named individuals (25%). The list sample was the common procedure in evaluations. Of the surveys that used a random household sample, most (29% of the total)

interviewed a specific family member (e.g. head, teenage child), and 16% interviewed any adult member. Fourteen per cent of the surveys were based on quota samples, i.e. interviewing a designated number of persons with specified demographic characteristics, 10% surveyed all persons in a specified area ("census"), and 6% used a combination of these sampling procedures or other techniques.

The number of respondents ranged from under 100 to several thousands. Surveys that interviewed both the poor and the non-poor tended to be larger than those that focused exclusively on the poor. The median number of respondents in surveys of poor and non-poor was 697, in surveys of only the poor the median was 366.

Researchers reported their interview completion rate for 137 studies. (Ten of the others were not yet completed.) Reported rates were high. In seven out of ten surveys, 80% or more of the expected number of interviews were completed. A quarter of those reporting indicated that they calculated the completion rate on a base that excluded some persons who could not be interviewed (e.g. unlocatables), and in these cases the completion rate was likely to be somewhat higher than when the whole sample was used as the base. Type of sample was related to completion rate. Surveys using quota samples were the most likely to have high completion rates; 63% of them had completed 90% or more of the intended number of interviews. At the other extreme, random household samples that required interviewing a specific family member were the most difficult; only 20% of them had this high a completion rate.

Researchers often expect poor people to be difficult to contact and interview. Our data suggest that the poor are not necessarily harder to interview than the non-poor; the type of sample has a large influence. This requires some explanation. In the surveys we examined, the proportion of low-income respondents varied considerably. The majority of respondents in surveys based on list and quota samples were poor; the majority in random household samples were not poor. When we look at completion rates by type of sample and proportion of low-income respondents, we see the following. With list samples, the higher the percentage of low-income respondents, the lower the completion rate. But in surveys based on random household samples, the opposite is the case. The higher

the proportion of respondents who are low-income, the higher are the completion rates. The implications are that interviewing the poor does not necessarily mean low completion rates and that other factors -- certainly type of sample, and probably length of time for collecting data, budget for callbacks, etc. -- play an important part.

Field operations. Most of the surveys (78%) interviewed at one point in time rather than interviewing the same individuals repeatedly. Two-thirds (68%) interviewed residents of one city, 18% interviewed in two to ten cities, and 14% conducted interviews in more than ten cities. Four out of five surveys (81%) were confined to one state. Only two surveys were conducted in 48 states.

For about half of the surveys, field work was conducted in the late 1960s, and the other half were conducted in 1970 and 1971. Time spent in the field varied from less than a month to as long as four years. The median length of time in the field was four months.

The questions in the interview were usually structured, requiring selection of answers from fixed alternatives, rather than open-ended. In 86% of the surveys questions were mainly structured, in 12% semi-structured, and in 2% mainly unstructured. Researchers reported on the complexity of the interview schedule in terms of skipping questions, asking different questions for different family members, etc. In 21% of the surveys, the interview schedule was very complex, in 35% somewhat complex, in 44% not particularly complex. The length of time that an interview with a low-income respondent took ranged from less than half an hour to more than two hours. The median length was fifty minutes.

Low-income respondents were generally cooperative about being interviewed. For 76% of the surveys their reaction to the interview was described as receptive, in 23% as indifferent, and in only 1% as hostile. Given the pervasive concerns about respondent suspicion and hostility and about the saturation of poverty areas with surveys, the reported level of acceptance is encouraging. As we shall see, whether or not the interviewers were similar to them in race and socioeconomic status, they tended to be equally receptive to the interview.

Interviewer safety was a pervasive concern for 11% of the studies. In another 57%, the real or perceived dangers of traveling through the

streets and buildings of poor areas was considered a problem for some areas or at some times. The other 32% of the studies were not concerned about safety. There were no differences in concern between studies that employed racially and economically "similar" interviewers and those that did not. When there were possible dangers to interviewers, most studies relied on interviewers to arrange for their own escorts or to go in pairs. Ten studies hired escorts to accompany them.

Contacts with the community. Prior to going into the field to interview, researchers on 60% of the surveys contacted community leaders or groups. Contacts were more likely when respondents were members of one minority group than when they were from several minority groups or when they were white. It is probably easier to identify community leaders in a homogeneous community, and there may be greater reason to guard against community suspicion or backlash when one minority group seems to be singled out for study.

A quarter of the studies had advisory committees on which members of the low-income community(ies) served. The functions of such committees were most likely to be promoting acceptance of the study in the community and aiding in the recruitment of interviewers. Somewhat less often they helped plan the study and received reports of study findings. They least often assisted in drawing implications from the findings for future action, aided in interpreting findings, or reported the findings to the community. Looking back on their experience with community contacts and advisory committees, researchers on half the studies considered them of considerable help, over a third said they were somewhat helpful, 9% said no help, and 4% reported that on balance they were a hindrance. This is a pretty fair endorsement.

RECRUITMENT OF INTERVIEWERS

Characteristics sought.

We asked our informants about the characteristics they sought when hiring interviewers. Three-quarters of the studies tried to match interviewers to respondents by race or ethnicity. They were most likely to seek race-matched interviewers when all or most of the respondents were from one minority group, least likely (and this may be partly a semantic distinction) when all or most of the respondents were white.

Did you try to match interviewers to respondents by race/ethnicity?	Respondent race/ethnicity: One non-black minority	Black	Mixed minorities	Mixed white and minorities	White non-Spanish
Yes	86%	81%	78%	71%	43%
No	14	19	22	29	57
Total	100 (14)	100 (67)	100 (32)	100 (28)	100 (23)

N=164
NA= 34
194

(Chi square significant at .05 level)

Two structured questions in the questionnaire explored the reasons for trying or not trying to recruit interviewers of the same race/ethnicity as the respondents. The reasons for matching were largely to gain acceptance and to encourage rapport. For half of the studies, the need to speak the respondents' own language was also a consideration. The frequency of reasons reported for seeking to recruit matched interviewers was:

Rapport is easier to establish and maintain	74%
Respondents are more likely to open the door and grant the interview	71
Matching by race/ethnicity helps overcome suspicion that the community might have about being studied	63
Respondents were non-English-speaking, so we had to use interviewers who spoke their language and dialect	53
Matching by race/ethnicity improves the validity of responses	45
It is difficult to recruit white interviewers who are willing to work in minority group areas	19
Other	9
(multiple responses)	334%

N=141
Not applicable, i.e. did not try to match = 51
No answer on matching = 2
194

The studies that did not try to recruit interviewers similar in race/ethnicity to respondents offered fewer reasons, an average of 2.0 per study compared to the 3.3 per study for those who sought to match. The reasons they gave were:

Our main consideration was to recruit the best interviewers available	69%
We used permanent staff to interview all respondents	40
Since the validity of response would not be affected by the race of the interviewer, matching wasn't necessary	35
We had no prior information about each respondent's race	25
It is difficult to recruit minority group interviewers	21
Other	13
(multiple responses)	203%

N=48
Not applicable, i.e. tried to match=141
No answer = 5
194

For both groups, difficulty in recruitment was a minor consideration in the decision on matching. Concerns about validity entered the decision on both sides of the issue, but did not engage a majority of either group.

Slightly more than half of the studies (53%) purposely tried to recruit interviewers who lived in the same neighborhood(s) as the low-income respondents they interviewed. Although the questionnaire did not ask for reasons, our preliminary interviews disclosed that two kinds of considerations influenced this decision: the kinds of concerns about acceptance, cooperation, and rapport that motivated race-matching, and a desire to improve the logistics of the field operation -- having ready access to interviewers and reducing travel costs.

The questionnaire also inquired about attempts to select interviewers who were similar to the low-income respondents in socioeconomic status, defined as level of education, occupational status, and income. We tried to further clarify the meaning of the question by stating: "We realize that because of the nature of their job, interviewers are likely to be better educated than average, but we mean to exclude interviewers who were, for example, college students, unemployed professionals, or 'moonlighting' professionals."

Trying to recruit interviewers of the same socioeconomic status (s.e.s.) as respondents was less common than either racial or neighborhood matching. On only one-fourth of the studies did researchers seek low s.e.s. interviewers. Again the characteristics of the study's respondents were important; when most respondents were members of one minority group, the study was more likely to seek low s.e.s. interviewers. They were sought on 42% of the studies with one non-black minority, 31% of the studies with mainly black respondents, compared to 18% of studies with a mixture of racial/ethnic groups. (Chi square significant at .001 level.)

The reasons offered in response to prestructured questions were:

Using interviewers of the same socioeconomic status helps overcome suspicion the community might have about being studied	81%
Rapport is easier to establish and maintain	75
We wanted to provide jobs for low-income people	71
Similarity helps to improve validity of response	46
Interviewers of the same socioeconomic status can locate respondents more easily, thus improving the completion rate	40
The funding body required or preferred the use of such interviewers	38
It is difficult to find middle class interviewers who are willing to work in low-income areas	10
Other	4
(multiple responses)	365%

N=48
Not applicable, i.e. did not try to match by s.e.s. =144
No answer = 2
194

For the studies that did not try to recruit low socioeconomic interviewers, reasons were scattered. Almost a third indicated that they had never considered the possibility. Reasons, and the proportion of studies reporting each, were:

We were concerned about their ability to read questions, record responses, etc.	37%
It is time consuming and costly to train and supervise such interviewers	32
We never considered it	31
It is difficult to recruit interviewers of low socio-economic status	29
The socioeconomic status of the interviewer has minimal effects on the validity of response	28
We used permanent staff to interview all respondents	24
We had no prior information about each respondent's socioeconomic status	18
We tried it on another study and it wasn't worth the effort	6
Other (e.g. used students, interviewers needed a car, other factors were more important)	17
(multiple responses)	222%

N=127
Not applicable= 48
No answer= 19
194

Thus, matching by socioeconomic status, like matching by race, was largely motivated by the desire to facilitate the fieldwork -- to overcome suspicion and establish rapport. Overcoming community suspicion was more often a reason for s.e.s. matching than for race matching; rapport was given as a reason equally often for both decisions. S.e.s. matching was also strongly influenced by a commitment to give jobs to poor people, perhaps in sympathy with the contention by low-income communities that money meant to aid the poor was being siphoned off to support researchers. Less salient were pressures from funders and difficulties in recruiting middle-class interviewers to work in poor neighborhoods. On the other side, the decision not to seek low s.e.s. interviewers was also influenced by operational considerations, in this case the skill level of such interviewers and their greater need for training and supervision.

A definition. Interviewers who were matched to low-income respondents in both race/ethnicity and socioeconomic status were a key interest of the study. In the questionnaire and in this report we refer to them as "indigenous interviewers." Because some people may object to the term, we indicated in the questionnaire -- and we repeat the injunction here -- that in Humpty Dumpty's words, this means just what we choose it to mean --

neither more nor less. The questionnaire stated, "We do not intend to imply anything other than certain specific characteristics: 'indigenous interviewers' are those similar to low-income respondents in both race or ethnicity and socioeconomic status."

Studies that hired indigenous interviewers. There were 102 studies that employed three or more indigenous interviewers. This was more than twice as many as purposely tried to recruit low s.e.s. interviewers; 54 studies acquired them without deliberate intent. In some cases, this was due to the conscious decision to hire "neighborhood residents," who then turned out to be of low s.e.s. In other cases, indigenous people apparently happened to apply for interviewing jobs and were hired.

What distinguished studies that employed indigenous interviewers from those that did not?

1. The number of respondents. Large surveys were most likely to have indigenous interviewers. When the sample size was over 1200, 71% of the studies used indigenous interviewers; when the sample was 500-1200, 49% had indigenous interviewers; for studies with fewer than 500 respondents, 34% used indigenous interviewers. (Chi square significant at .001 level, gamma = .48) Analogously, the number of low-income respondents in the sample showed the same relationship. The larger the number of low-income respondents, the more likely was the study to employ indigenous interviewers.

2. The percentage of low-income respondents in the interview sample. The higher the proportion of low-income respondents, the more likely was the study to use indigenous interviewers. (Chi square significant at .01 level, gamma = .41)

3. The type of research group. Government agencies were most likely to employ indigenous interviewers (78%) and university researchers least likely (40%). Non-university non-profit institutions (59%) and profit-making firms (51%) were intermediate in their use. (Chi square significant at .001)

4. The type of sample. We looked at the five methods that studies used for selecting respondents: (1) from a list of names (e.g. of participants in a particular program), (2) quota sampling (i.e. finding specific numbers of persons who fitted given demographic categories, such

as 'white women aged 20-44'), (3) random selection of housing units with interviews with any member of the household, (4) random selection of housing units, interviews with a pre-specified member of the household (e.g. male head), (5) complete census (i.e. interviewing all households in a given location, such as a public housing project). Indigenous interviewers were most commonly used when the sample was a census or based on random selection of households, least commonly used for quota and list samples. (Chi square significant at .01 level.) The figures show that indigenous interviewers were used in:

79% of studies using a census (15/19)
68% of studies with random household survey, any adult interviewed (21/31)
61% of random household surveys, specific member interviewed (34/56)
35% of studies with quota samples (9/26)
33% of studies with list samples (16/48)

Inasmuch as random household surveys are more demanding of the interviewer, who has to follow specific randomizing procedures to locate the appropriate household, the greater use of indigenous interviewers under these circumstances is somewhat surprising.

5. Length of the interview. Indigenous interviewers were more likely to be used when interviews were shorter than an hour than when the average length of the interview was an hour or more. However, studies with very short interviews (35 minutes or less) were not more likely (in fact a bit less likely) to use indigenous interviewers than those with interviews averaging 36 minutes to an hour. (Chi square significant at .05 level, gamma = .20)

6. Structure of the interview questions. When most questions were closed-ended (requiring choices among listed alternatives), indigenous interviewers were more commonly used. Fifty-five per cent of studies with structured questions employed indigenous interviewers, compared with 32% of studies with mainly semi-structured or unstructured questions. (Chi square significant at .01 level, gamma = .44) This does not necessarily mean that the format of questions affected the choice of interviewers; the two factors may have interacted. If the study decided to use indigenous interviewers, the researcher may have tried to put as many questions into a forced-choice format as possible.

7. Complexity of the interview schedule. The less complex the mechanics of the interview (in terms of skipping questions, asking different questions for different family members, etc.), the more likely was it for a study to have indigenous interviewers. (Chi square significant at .01 level)

8. Contacts with community leaders. Studies that contacted community leaders or groups before beginning the field work were more likely to use indigenous interviewers than those that did not. Sixty-four per cent of the former had indigenous interviewers, compared with 34% of the latter. (Yates chi square significant at .001, gamma = .55) Similarly, studies that had members of the low-income community serving on an advisory committee were more likely to have indigenous interviewers, 74% of these studies compared with 46 per cent of studies without community representatives on an advisory group. (Yates chi square significant at .01, gamma = .34) Responses indicate that the two most frequent functions of community contacts and advisory committee representation were to promote acceptance of the study in the community and to aid in recruiting interviewers. Therefore, we might suspect that the use of indigenous interviewers was both a cause and an effect of community contacts. This in fact is the case. When we distinguish studies that purposely tried to recruit indigenous interviewers from those that did not, we find that the "seekers" were significantly more likely to contact community groups and to have community members on an advisory committee. On the other hand, when we look at the studies not seeking indigenous interviewers, we find that those who contacted community leaders and groups and/or had community advisors were significantly more likely to wind up with indigenous interviewers on the interviewing staff. The following table shows one set of relationships between use of indigenous interviewers and community contacts. (Note that there were no studies that tried to recruit indigenous interviewers and failed to do so.)

	Indigenous interviewers were: Sought, obtained	Not sought, but obtained	Not sought, not obtained
Contacted community leaders/groups	83%	65%	46%
Did not contact community leaders/groups	17	35	54
	100% (47)	100% (51)	100% (90)

N=188
No answer= 6
194

(Chi square significant at .001 level)

Other factors were not significantly associated with the use of indigenous interviewers. We examined a number of variables that might be expected to have been related, but were not, including:

- race/ethnicity of study respondents
- concern for the safety of interviewers
- year in which the fieldwork was done
- purpose of the survey (evaluational, attitudinal, etc.)
- topics covered
- source of funds
- one-time or longitudinal study
- inclusion of "sensitive" questions in the interview
- number of cities in which interviewing was done
- receptivity of respondents to be interviewed.

Other characteristics of interviewers employed. Well over half the interviewing staffs (59%) were predominantly female; 31% were about equally composed of female and male interviewers; in 10% of the studies males predominated. The larger the staffs, the more likely were the majority of interviewers to be women. The sex of the interviewers was related to the sex of the respondents. When most of the respondents were men, the interviewers were more likely to be men.

	Respondents were: Mostly female	Both female and male	Mostly male
Interviewers			
Mostly female	81%	56%	18%
Both female and male	13	37	47
Mostly male	6	7	35
	100% (52)	100% (99)	100% (17)

N=168
NA on respondents = 19
NA on interviewers = 5
NA on both = 2
194

(Chi square significant at .001 level)

At least a few college students were employed on 75% of the studies. They comprised most of the interviewers on 12% of the studies -- most commonly when the studies were run out of universities. Professionals, such as social workers and teachers, interviewed on almost two-thirds (64%) of the studies, but were the majority of the interviewing staff on only 12%.

About one-quarter of the studies (24%) were staffed mainly by interviewers who had done previous interviewing for the organization. At the other extreme, almost one-third (31%) had no interviewers who had previously interviewed for the organization.

Interviewer attrition. One of the conditions that can impair or delay interviewing of poverty populations is the loss of interviewers after they have been trained. We wanted to ask our informants the numbers of interviewers who had left their jobs before the survey was finished, but the exploratory interviews we conducted with field directors indicated that very few kept records or could estimate numbers. Nevertheless, the effects of interviewer attrition were reported as serious.

> A proportion just didn't complete assignments and disappeared.
>
> Some just disappeared. We don't even know why they left.

One study director who did keep records reported:

> Originally we desired 40 interviewers, but recruitment was too low and attrition was high. Our original number of interviewers was 26 and only 15 were left at the end of the survey, and of these only 6 were of the original 26.

The questionnaire asked, "Most studies experience some attrition or turnover among interviewers. On this study, how much of a problem was the interviewer attrition after training, again among those interviewers assigned to low-income respondents: a major problem, a minor problem, not particularly a problem." Eighty-three studies (43%) indicated that attrition was not a problem, and 32 of them added that they didn't lose a single interviewer. Almost one-third (31%) said that attrition was a minor problem. In some cases this was because interviewer loss was low, but in others, it was because the field director was prepared for heavy attrition:

> I plan on hiring and training at least three times the number I'll need for interviewing, for attrition is that high. They have no idea what they're getting into....
>
> We lose interviewers, but we expect to and we systematically replace them--therefore attrition is not a "problem." However, you do have to take into account the availability of replacements, procedures for replacement, etc.

For one-quarter of the studies (26%), attrition was viewed as a major problem. There were several characteristics associated with the severity of interviewer loss:

1. Type of research organization. Government agencies and profit-making organizations were more likely to report attrition as serious than were universities or non-profits.

2. The size of the interviewing staff. The larger staffs tended to have more serious problems. Some comments indicated that the need for large staffs led to taking interviewers of marginal qualifications in order to fill the ranks and also made the search for replacements a constant struggle. One informant stated:

> Because of the constant pressure to get the job done and the relatively small staff per city, the loss of a single interviewer can cause serious difficulties. Time to hire and recruit is a luxury not always available. Thus, you find yourself taking whatever you can get... In the same vein, our major problems occur in the Eastern and Northern cities--primarily New York, Chicago and Detroit--in which racial tensions, high crime rates and fear exist; at the same time, the job market is tight.

3. Use of indigenous interviewers. Studies that used indigenous interviewers were significantly more likely to report loss of interviewers as serious. Thirty-six per cent of staffs with indigenous interviewers, as compared with 15% of non-indigenous interviewer staffs, reported major problems. When indigenous interviewers made up 90-100% of the staff, problems tended to be most severe.

Two mediating circumstances can be noted. Indigenous interviewers were much less likely to have had prior interviewing experience than other interviewers, and thus were less prepared for the pressures of the job. Secondly, 30 surveys that did not seek indigenous interviewers based their decision on the fact that they had a permanent staff of interviewers; dropouts from such a staff can be expected to be less severe.

Furthermore, studies that purposely sought indigenous interviewers had fewer problems than those which happened to hire them.

	Indigenous interviewers were:		
	Not sought, but obtained	Sought, obtained	Not sought, not obtained
Attrition was:			
Major problem	45%	27%	15%
Minor problem	25	31	34
Not a problem	29	42	51
	100%(51)	100%(48)	100%(92)

N=191
NA= 3
194

(Chi square significant at .005 level)

It seems likely that the studies that hired indigenous interviewers by intent were better prepared for possible attrition problems, and therefore hired extra interviewers to start with or were geared up for further recruitment and training as the fieldwork proceeded. An alternative hypothesis--that they gave them more training and closer supervision--is not supported by the data. (See next section.)

4. Interview completion rate. When interviewer attrition was a serious problem, completion rates tended to be lower. While a relatively low completion rate may have affected the researcher's definition of attrition as serious, it is probably closer to the realities to see attrition as affecting the number of interviews completed. Of studies citing attrition as a major problem, over half had completion rates of less than 80%; of studies without attrition problems, one-seventh had completion rates this low.

Not associated with the seriousness of attrition was the length of time that the study was in the field. Some of our informants indicated that most attrition occurs early, as beginners find out that the job is too demanding or uncongenial and as supervisors weed out people who perform poorly. Also, while studies that extend over a longer period may lose more interviewers, they have more time to replace them. Nor did the year in which the study was done show a relationship to attrition.

Reasons for attrition. In our exploratory interviews and in comments written on the questionnaire, we received a variety of explanations for interviewer turnover:

> Some of the applicants sat through training just to get paid. They never intended to return for work...
>
> Often they weren't smart enough to handle the schedule.
>
> Frustration of locating mobile people in an urban area.
>
> Lost all white interviewers after the riot.
>
> Some of the gals were pretty heavy and climbing up stairs is pretty hard.
>
> The best interviewers left because they found better jobs--especially the bilingual ones.

The questionnaire responses indicated that both interviewer-initiated and supervisor-initiated reasons accounted for attrition. Reasons offered, and the percentage of studies listing each, were:

Interviewers' reasons	
personal reasons (e.g. home or family responsibilities)	60%
conditions of work (e.g. poor pay procedures, poor supervision)	40
other job offers	40
Interviewers were encouraged to leave	
irresponsibility (e.g. in completing assignments)	46
poor quality of work	45
(multiple responses)	231%
	N=139
Not applicable, i.e. no attrition	= 32
No answer	= 23
	194

There were few differences between indigenous interviewer staffs and non-indigenous interviewer staffs in the reasons given. Staffs with indigenous interviewers were slightly more likely to cite interviewers' personal reasons and irresponsibility, and slightly less likely to report other job offers and poor quality work. But the over-all pattern for the two groups was similar, and only a few reports specifically

mentioned reasons for leaving that applied exclusively to indigenous interviewers:

> In the beginning, payment was hard and interviewers quit because of it. If the interviewers hadn't been indigenous, they would have had cash reserves to use while the checks were held up. The first check was held up longer than three weeks.

INDIGENOUS INTERVIEWERS: RECRUITMENT, TRAINING, AND SUPERVISION

This section deals with experience with indigenous interviewers only and is based on the responses of the 102 studies that employed them. Our first set of questions had to do with recruitment. What are the sources that a study director uses in finding indigenous interviewers?

Recruitment.

In our exploratory interviews with study directors in the Northeast (largely New York area), we heard a number of techniques and concerns mentioned:

> The key to recruitment is to get a respected local person on your side who can direct you. Sometimes this person is a figure in the local black college, a social worker, etc. Sometimes it will be the local bookie or bartender; if you find him, he's a great source.
>
> A large percentage of our staff is black, and we have good contacts with neighborhood organizations. If 50 or fewer indigenous interviewers are needed, word-of-mouth usually suffices.
>
> We used numbers runners as local consultants who were screened by a knowledgeable and credible person.
>
> You can't use a "brand-name" black. He's not as aware of what is going on in the community as someone who lives and works there.
>
> When one community agency proved inadequate, we tried several others, and tried the local school employment office. The most productive sources turned out to be word-of-mouth of the interviewers already hired.
>
> A problem arose in that although allegedly the centers served all community residents, within centers one or another race was favored. Referrals from centers, then, were either mostly all Negro or all Puerto Rican.

Questionnaire responses indicated that, as these quotations suggested, the sources most commonly used were interviewer word-of-mouth, community agencies, and knowledgeable people in the community. Most studies used multiple sources. When informants were asked to rate the usefulness of the sources they had tried for recruitment, these three sources were very high. Also reported as useful were word-of-mouth through study staff and their own organization. Formal sources -- schools and colleges, employment

agencies, newspaper ads, and other research organizations -- were less often used and less often useful.

Sources for recruitment of indigenous interviewers	Number of studies using source	Percentage of users who rated source useful
Interviewer word-of-mouth	80	89%
Community agencies (settlement houses, probation department, etc.)	71	90
Knowledgeable people in the community	66	85
Staff word-of-mouth (other than interviewers)	55	87
Own organization	52	83
Local schools and colleges	45	74
Newspaper ads	45	73
Employment agencies	37	74
Other research organizations	19	55
	N = 102	

In approaching potential recruitment sources, study directors emphasized the need for applicants with a suitable level of literacy, adequate time available for interviewing, and/or residence in the neighborhood. They somewhat less often stressed the need for knowledge of the area being surveyed or pleasant personality, and least often set qualifications of sex or age, or previous interviewing experience. Whatever qualifications they sought, about half the studies found recruitment easy and half found it difficult. Even requirements for a combination of characteristics were not associated with the difficulty of recruitment; studies looking for one or two characteristics in their applicants reported difficulties in recruitment just about as often as those seeking five or six. Perhaps aspirations and realities tend to move into equilibrium, so that studies facing a limited supply of prospects scale down their requirements.

When we looked at the relation between the number of indigenous interviewers employed and the ease or difficulty of recruitment, we found an unexpected relationship. Studies with larger numbers of indigenous interviewers were significantly more likely to say that recruitment was very or

fairly easy. Analogously, studies on which indigenous interviewers made up a higher proportion of the interviewing staff reported that recruitment was easier. Perhaps the number and the proportion of indigenous interviewers on staff is in part a result of recruitment problems; studies that had trouble locating indigenous interviewers may have ended up hiring fewer of them.

With hindsight, 28% of the study directors suggested modification in recruitment procedures. Most of them in retrospect would have set tougher selection criteria, in terms of literacy, education, reliability, experience, etc. Others would have expanded their recruitment sources:

> Contacting community leaders to a greater extent, sending fliers to be posted in agencies, stores, libraries, etc.
>
> I'd try newspaper ads -- also employment agencies.
>
> I'd try to contact more community organizations.

Characteristics of the interviewing staffs: What were the characteristics of the indigenous interviewers who were finally hired? All or most of them were:

residents of the neighborhoods in which respondents lived	. . .in 64% of studies
previously employed in white collar jobs	. . .in 59%
high school graduates	. . .in 57%
experienced interviewers	. . .in 17%
previously employed by the research organization or group	. . .in 14%
holding another job when hired as interviewers	. . .in 6%

The studies that deliberately sought indigenous interviewers as a matter of policy were more likely to have indigenous interviewers who were not high school graduates and not experienced in interviewing. They were also the studies on which indigenous interviewers made up the highest proportion of the total interviewing staff.

Over all, on one-third of the staffs that employed ingigenous interviewers, they comprised 40% or less of total interviewers, on one-third they were 41-80% of the total, and on the final third, they were 81-100% of the staff.

Training.

We asked about four specific training practices for indigenous interviewers: number of hours of class training, size of the training group. supplementary topics covered (in addition to those usually taught to interviewers), and number of practice interviews before the start of regular interviewing.

Hours of class training varied widely:

fewer than 8 hours	23% of studies
9-16 hours	23%
17-39 hours	26%
40 hours and over	27%
	99%

N=102

As for the size of the training group, a third of the studies trained in groups of 8 people or fewer, a third in groups of 9 to 12, and a third in groups of 13 or more. The largest group reported was 40.

Few supplementary topics were included specifically for indigenous interviewers. One-third of the studies did not include any material that was not part of their usual interviewer training program. The only subject added with any frequency (64% of the studies) was the value of the research to the community. Some informants, on the other hand, entered a caveat: Don't promise anything that isn't so; over-promising can backfire. Two cautionary comments were:

> Most of these gals are sophisticated enough not to believe it -- they are aware.
>
> I explain to each community I go into that I am not there to solve or leave any problems; I am just there to collect the data and get out.

About two studies in five (39%) included information in the training about community services that respondents might ask about. But only one-fifth of the studies or fewer attempted "compensatory education"; map reading (20%), directions, i.e. north, east, south, west (15%); speaking or reading English (11%); writing and spelling (10%); arithmetic (9%). Much of this additional training was concentrated in a relatively few studies. As one of our informants noted:

> I'm not about to get into this without a manpower training grant.

The number of practice interviews that interviewers did before regular fieldwork was relatively low. In over a quarter of the studies (27%), no practice interviews were done; in something over a third (36%), indigenous interviewers did one or two practice interviews; and in a like number (37%), three or more were done.

The pattern of training activity, then, is not one of concentrated effort to compensate for the lower education and experience of indigenous interviewers. Many of the study directors and field supervisors recognized the lacks. While only three studies reported that their training did not prepare interviewers well, about two-thirds were content to characterize training as working "fairly well." Almost half of the studies proposed modifications in training for future studies. Well over half of the suggestions stressed more training, often with the actual interview instrument.

> Spend more time in training.
>
> Should have spent more time on the actual instrument in training.
>
> More instruction on the contingency structure of the instrument.
>
> More total time but spread out using shorter sessions.

Another third of the suggestions were variations on the theme of more practice interviews, both mock interviews in class and live interviews in the field.

> Should have conducted lengthy training sessions with mock interviews. . .
>
> The mock interview part of training should be designed so that the cases presented become increasingly more difficult and complicated.
>
> More practice interviews.
>
> More on-the-job training and less classroom training.

Other suggestions included:

> Midway through the interviewing process or earlier, I should have provided for a two-hour meeting where interviewers could have discussed problems, asked questions, etc.
>
> Should have paired more experienced interviewers with new recruits.
>
> Some ethnic groups respond better if they are in separate groups. For example, some Spanish-speaking interviewers were self-conscious about their English.

The frequency of suggestions for improving training were:

More practice in interviews in class and in the field	36% of studies
More training on the schedule	31
Longer training	24
Increased individual attention to interviewers in the training	11
Provide for general discussions	7
Other (examples above)	31
	140% (multiple answers)
N =	45

Comparison of training for different types of staffs. We have information about training only for indigenous interviewers and cannot compare practices with those used with middle-class interviewers. Nevertheless, we can make comparisons (1) between studies that "creamed" by hiring the best educated and most experienced people of low s.e.s. and those that hired more "disadvantaged" interviewers, (2) between studies with different proportions of indigenous interviewers to total interviewing staff, and (3) between studies that hired indigenous interviewers by deliberate intent and those that did not. These measures are interrelated. Studies that sought indigenous interviewers tended to hire more "disadvantaged" interviewers, which we define here as not being high school graduates and not having interviewing experience (gamma = .43). They also were more likely to have high proportions of indigenous interviewers on staff (gamma = .72). And to complete the linkages, when indigenous interviewers comprised over 60% of the staff, they were more likely to be "disadvantaged" (gamma = .50).

Our assumption, based on common sense and field experience, is that when few interviewers are high school graduates or have previous interviewing experience, they should receive longer training, be trained in smaller groups to allow for personal attention and discussion, and have the opportunity to do a larger number of try-out interviews before beginning work. The data show that this is not the case. The findings are:

1. Studies with high proportions of disadvantaged interviewers offer no more adequate training. They tend to give slightly shorter classroom

training in larger groups, but to assign somewhat more practice interviews; the differences are not statistically significant. Thus, when most of the indigenous interviewers are both high school graduates and have prior experience, 35% of the studies offer 40 hours of training or more; when most indigenous interviewers are neither high school graduates nor have prior experience, 16% give 40 hours of training or more. When interviewers are experienced high school graduates, 42% of the studies train in groups of eight or less; for the "disadvantaged," 19% of the studies train in groups this small. Only with regard to practice interviews are disadvantaged staffs favored: 48% of them do three or more practice interviews compared to 19% of the advantaged staffs. The practice is a partial compensation for lack of prior interviewing experience.

2. Studies with high proportions of indigenous interviewers on staff do not offer more adequate training. If we divide staffs into those on which indigenous interviewers (IIs) comprise 60% of the staff or less, and those on which indigenous interviewers are 61-100% of the staff, we find that 30% of the former (low-II) studies give 40 hours of training or more, compared with 25% of the high-II studies. With regard to size of training group, high-II staffs train in larger groups.

Size of training group	Percentage of indigenous interviewers 1-60% of staff	61-100% of staff
8 or fewer	42%	28%
9-12	39	30
13 or more	18	43
	99% (33)	101% (47)

(Chi square significant at .051 level, gamma = .31)

N = 80
NA = 22
102

For practice interviews, the story is more favorable. About the same proportion of studies in both groups assign no practice interviews, but somewhat more studies with high-II staffs assign 3 or more try-out interviews, 46% compared to 30% for low-II staffs.

3. Studies that purposely sought indigenous interviewers did not give them more adequate training. This is probably the most surprising finding.

Of studies that sought indigenous interviewers, 17% give them 40 hours or more of training, 27% train in groups of eight or less, 44% assign three or more practice interviews. Equivalent figures for the "did not seek" studies are: 36% give 40 hours or more of training, 43% train in groups of eight or less, 31% assign three or more practice interviews. Practice is again the one advantage that purposely-recruited interviewers get.

A possible mediating factor is that indigenous staffs may have administered less difficult interview schedules. We constructed a composite index for the difficulty of the interview, based on four items: length of the interview, structure of the questions, complexity of the schedule, and number of sensitive questions. When indigenous interviewers were a high proportion of the staff, interviews did tend to be less difficult. There was no association at all, however, between the difficulty of the interview and either length of training, size of training group, or number of practice interviews.

When we come to the section on interviewer supervision, we will see much the same pattern: staffs with indigenous interviewers who were heavily inexperienced and non-high school graduates, staffs that had higher proportions of indigenous interviewers, and those for which the indigenous were actively sought, were no more likely to receive "extra" supervision. But let us turn to one more aspect of the training.

Interviewing mode. We asked, "In general, did you train interviewers to be warm and friendly, or cool and detached?" Almost two-third of the studies (63%) said "warm and friendly," 12% said "cool and detached," and the remaining 24% found the dichotomy inappropriate and wrote in an answer indicating a combination of the two styles. Examples: "combination of both, warm but professional," "really detached and just friendly enough to establish rapport," "sympathetic but professional," "friendly yet businesslike." The type of research organization made a difference. Profit-making groups were particular patrons of the warm and friendly mode, with 86% of their studies adopting it. While cool detachment has few adherents -- only 11 studies, 8 of the 11 were government agencies. The third alternative, friendly but businesslike, was more likely to be favored by non-profits and universities. Nevertheless, "warm and

friendly" garnered a clear majority among all types of organizations.

Although there is no guarantee that training interviewers to a certain mode results in their use of that mode, we looked at the relation between these answers and completion rates. There was no difference among the three modes. We also looked at assessments of the interviewer performance. On a few of the performance items (as we shall see in more detail in the chapter on Assessment of Interviewer Performance), there was a difference. Interviewers trained to the "combined" mode tended to be rated higher.

Satisfaction with training. The study directors tended to be most satisfied with their training programs under three kinds of conditions: (1) when their interviewers were more "advantaged" to begin with, (2) when the training was longer and included several "basic skills," and (3) when they had a longer time for fieldwork.

Two characteristics of indigenous interviewer recruits were particularly related to a sense that the training had worked very well, viz. high school graduation and previous interviewing experience. When most of the indigenous interviewers had either of these qualifications, training was more often perceived as working "very well." The relation between directors' satisfaction with training and the proportion of high school graduates is significant at the .011 level, gamma = .51; the relation between satisfaction with training and the proportion of interviewers with interviewing experience is significant at the .051 level, gamma = .62. Not related to the perceived efficacy of training were such other interviewer characteristics as previous white-collar experience, sex, or holding another job at the time of recruitment.

Characteristics of the training that were associated with directors' satisfaction with training were the length of training (the more hours offered, the better), and the inclusion of four or more "supplementary" topics including basic skills (map reading, directions, etc.). Not significantly related were the size of the training group or the number of practice interviews assigned.

Duration of fieldwork was also associated with directors' satisfaction with the training. The longer the study was in the field, the

greater the satisfaction (gamma = .48), perhaps because a relaxation in the pressure to produce allowed for a less harried schedule.

Supervision.

Of the 102 studies with indigenous interviewers, three-quarters indicated that their supervisors had previous experience in supervising interviewers, and almost two-thirds (62%) reported that they were experienced in supervising indigenous interviewers.

We asked about the number of indigenous interviewers assigned to each supervisor. Twenty studies could not answer, usually because they did not operate in this manner, e.g. supervisors had "roving assignments" rather than responsibility for a given number of interviewers. Of the rest, one-third (34%) reported five or fewer interviewers per supervisor, 41% reported 6-10 interviewers per supervisor, and 24% had 11-25 interviewers for each supervisor. (Since the question asked only about indigenous interviewers, we are not sure whether these figures represent the total supervisory load or whether supervisors supervised other, non-indigenous interviewers in addition.) The overwhelming majority of studies were satisfied with their supervisor-interviewer ratio whatever the number; only 14 studies indicated dissatisfaction, 12 of them saying that too many interviewers were assigned to a supervisor.

Four out of five studies had at least one supervisor of the same race or ethnicity as the indigenous interviewers. In a third of the cases, all or most of the supervisors were similar in race/ethnicity to the interviewers. The race-matched supervisors tended to have less experience in supervision. Only half the studies with all race-matched supervisors reported that their supervisors had prior experience, compared with 95% of those with no race-matched supervisors. (Chi square significant at the .01 level, gamma = .63.)

What supervisory procedures were used? Responses to a structured question showed the frequency with which the following practices were used:

frequent face-to-face meetings between interviewers and supervisors	96% of studies
immediate editing of completed schedules	91
verification that the interviews had been done	83
observation of interviewer performance in the field	52
production standards for interviewers	51
reinterview of selected respondents	38
comparison of distribution of responses obtained by different interviewers	25
	436% (multiple responses)
	N = 99
	NA = 3
	102

Studies averaged 4.4 practices, with the most common being face-to-face meetings, immediate editing to detect missing data or inconsistent or nonresponsive answers, etc., and validation to uncover any instances of "cheating." There were few differences in practice by the difficulty of the interview. "Hard" interviews elicited no more supervisory attention than simpler ones -- but the overall level of effort reported is very high.

Comparison of supervision with different types of staffs. As with training, we cannot compare the supervision given to indigenous interviewers with that given to traditional interviewers. But we can look at "disadvantaged" versus relatively advantaged interviewing staffs (in terms of high school graduation and prior interviewing experience) and the 60%+ indigenous staffs versus staffs with lower proportions of indigenous interviewers. Again, the data show that staffs with less education and experience and with a higher proportion of indigenous interviewers do not receive greater attention. Thus, for example, on studies in which indigenous interviewers make up most of the staff, they are somewhat less likely to have experienced supervisors, although the difference is not statistically significant.

	Percentage of indigenous interviewers on staff	
	1-60	61-100
Experienced supervisors	74%	57%
Inexperienced supervisors	26	43
	100% (39)	100% (47)

N = 86
NA = 26
102

Part of the reason lies in the employment of supervisors matched to interviewers in race or ethnicity, who, as we have seen, tend to have less experience in supervision.

Another example is the interviewer-supervisor ratio. There is a non-significant tendency for studies with the more disadvantaged interviewers to assign more interviewers to each supervisor.

	Most interviewers were:		
Number of interviewers per supervisor	High school grads and experienced	Either high school grads or experienced	Neither high school grads nor experienced
1-5	40%	33%	30%
6-10	45	42	35
11-25	15	24	35
	100% (20)	99% (33)	100% (23)

N = 76
NA = 26
102

We constructed an index of "adequacy of training and supervision," based on normative standards for five practices: length of training, size of training group, number of practice interviews, previous experience of supervisors, and interviewer-supervisor ratio. We examined the relation between this index and both the relative "disadvantage" of the indigenous interviewer staff and the proportion of indigenous interviewers to total staff. In both cases, the adequacy of training and supervision was lower, although not significantly. The following table presents the relationship between adequacy of training and supervision and degree of disadvantage.

Adequacy of training and supervision	Most interviewers were: High school grads and experienced	Either high school grads or experienced	Neither school grads nor experienced
Low	30%	22%	35%
Low-middle	26	22	35
High-middle	22	31	23
High	22	25	6
	100% (23)	100% (36)	99% (31)

N = 90
NA = 12
102

(Chi square not significant, gamma = -.18)

Studies that purposely sought indigenous interviewers provided overall training and supervision that was, if anything, less adequate in terms of the items in the index than those which did not--although differences did not reach statistical significance. Of studies that sought indigenous interviewers, 37% had high or high-middle scores on the adequacy index, compared to 52% of the studies that hired indigenous interviewers without deliberate intent. Thus, when we seek to generalize about the performance of indigenous interviewers, we can only do so in the context in which they have generally received no extra training or supervisory support.

Satisfaction with supervision. Approximately a third of the studies (35%) reported that their supervision worked very well to facilitate high quality interviewing, 6% said that it did not work well, and the largest group (59%) selected the intermediate category of "fairly well." Satisfaction with supervisory practices was significantly related to only one aspect of supervision itself: prior experience of the supervisors. When supervisors had had experience on earlier surveys, study directors tended to rate the effectiveness of supervision higher (gamma = .50). Satisfaction was also related to one characteristic of indigenous interviewers: their previous experience in interviewing (gamma = .48). Thus clearly with experienced people, supervision operates more smoothly.

Satisfaction with supervision was also strongly associated with satisfaction with training (gamma = .92). While there may be a "halo" effect here (some people tend to see everything in rosier hue) and some of the factors associated with success in both cases are the same (e.g. the

characteristics of interviewers), it is also reasonable that effective training reduces the problems that the supervisor has to cope with and facilitates the operation of the survey.

Another relationship that was significant was between satisfaction with supervision and attrition. When supervision was rated high, interviewer attrition was less of a problem. There is also the possibility that the sequence runs the other way: when interviewer turnover was severe, study directors may have rated supervision as less effective. But the common wisdom would suggest that good supervision does in fact reduce the loss of interviewers.

The final relationship is harder to explain. Study directors were likely to be more satisfied with supervision when the interview was most difficult. (Difficulty of the interview, as noted before, was an index derived from four items: length of interview, structure of the questions, complexity of the schedule format, and inclusion of sensitive questions.) The higher the difficulty, the better the rating on supervision (gamma = .36). Since supervisory <u>practices</u> did not vary with the difficulty of the interview, as training practices did not, our only hunch is that study directors' expectations varied. When things worked well with a complex interview, they may have upped their estimate of supervision.

Not associated with satisfaction with supervision were: specific supervisory procedures used, interviewer-supervisory ratio, the proportion of indigenous interviewers on staff, the proportion of interviewers who were high school graduates, intent to recruit indigenous interviewers, the length of time the study was in the field, or whether the study director or field supervisor did the rating.

However well supervision worked, half of the studies indicated that in retrospect they would have changed some supervisory procedures. Far and away the most frequent change proposed was tightening supervisors' control over interviewers.

> ...needed tighter control over daily performance.
>
> Closer quality control checking completed schedules, stricter production standards, and more frequent review of performance.
>
> I should have found a way to prevent the restriction on production. Interviewers knew an interview per

> day was minimum standard and rarely exceeded it. It was in their interest to continue field work as long as possible.
>
> More field observation through double interviewing and related methods.
>
> More time for field observation, and I would delegate a lot of office work done by supervisors to a clerk.

Other suggestions included using more qualified supervisors, additional training for supervisors, tighter control by the "central office" over supervisors, setting higher standards, and more time all-around.

> More time for the supervisor to review work, point out problems.
>
> I excused mistakes too easily the first couple of months, and we all got tired the last two or three months.
>
> ...have supervisors report to the control office daily, and have interviewers meet with supervisors daily.
>
> Additional training for less experienced supervisors.

Pay procedures. Most studies (69%) paid interviewers on an hourly basis. One-fifth (21%) paid by the interview, and the rest used a variety of compensation schemes (e.g. both hourly and by the interview "depending on the interview form used"). Two studies paid interviewers a regular weekly salary.

When pay was hourly, the majority of staffs were paid between $2.25 and $2.75 an hour. A quarter of the studies provided bonuses or pay increases either for high productivity (e.g. more than seven interviews a week) or after the interviewer completed a specified number of interviews. The increases tended to be nominal.

Our exploratory interviews with study directors had alerted us to problems that might occur when pay for indigenous interviewers was delayed. Accordingly, we asked how frequently interviewers were paid and how much time generally elapsed between submission of a time sheet and receipt of payment. Half the studies paid biweekly and most of the others paid on a weekly basis. Only one study arranged to pay more often than once a week, and at the other extreme, six studies paid their indigenous interviewers monthly. In terms of time elapsed, two

weeks was the modal interval between submitting forms and receiving pay; almost a third of the studies reported a lapse of one week, and twelve studies reported less than a week. In six cases interviewers had to wait a month. It seems, therefore, that most studies adhered to the usual organizational schedules and relatively few adjusted their procedures to provide speedy payment for indigenous interviewers.

Subsequent employment. As we have noted, one of the reasons given for employing indigenous interviewers was to provide jobs for poor people. But once their short-term employment on the study was over, how did they fare? Did their interviewing experience enable them to obtain further interviewing jobs? Did it facilitate their employment on other jobs because of the skills they had learned?

Many study directors did not know. In response to a question about how many indigenous interviewers wanted another job after the interviewing was completed, 23% indicated that they could not answer. Forty per cent said that all or most of the indigenous interviewers were interested in getting other employment, 25% said that some were, 11% said few, and 1% said none. On six out of ten studies, directors (or their staff members) tried to locate subsequent jobs for some of the interviewers, overwhelmingly in their own organization. We asked what kinds of jobs the interviewers obtained, whether through the staff's efforts or on their own. Over a third of the study directors stated that they did not know. Forty-four studies reported that at least one person got another interviewing job, 11 studies reported that at least one person became an interviewing supervisor, 9 studies reported another research job such as coding, 15 studies reported other jobs that used skills learned through interviewing. The impression gained from these responses is that study directors and field supervisors expend relatively little effort in trying to place ex-interviewers (they can't afford to) unless another study is coming along in their organization. Some indigenous interviewers go on with interviewing, a few move into supervisory jobs, but the viability of interviewing as a "career" for large numbers of low-income people or as an entry to other jobs is problematical.

ASSESSMENT OF INTERVIEWER PERFORMANCE

Study directors rated the performance of all three types of interviewers -- indigenous interviewers, race-matched (i.e. interviewers similar to respondents in race or ethnicity but not socioeconomic status), and non-matched (i.e. interviewers not similar to respondents in either race/ethnicity or socioeconomic status). Ratings were requested on a three-point scale -- very good, fairly good, not too good -- for 12 specific tasks of interviewing. The following table presents the percentage of studies rating each kind of interviewer "very good." The assessments come from the reports on 194 studies, some of which employed and rated two or three types of interviewers. Obviously, when rating a sizable number of interviewers on any task, the study director is making generalizations across individuals who vary in performance -- and sometimes on the basis of limited evidence. For example, we ask for ratings on "establishing rapport" and "eliciting valid responses." Most study directors and field supervisors have little if any first-hand evidence on such items and their ratings are "best judgments." There is also a possibility that some study directors are giving stereotypical ratings rather than ratings grounded in experience. With these caveats, let us look at the assessments.

Percentage of Studies Rating Interviewers "Very Good"

Tasks	Type of interviewer: Indigenous (N=102)*	Race-Matched (N=112)*	Non-Matched (N=91)*	Percentage point difference (Indigenous to non-matched)
Contacting proper respondents	56%	61%	65%	-9
Locating "hard to reach" respondents	38	41	37	+1
Following interview specifications	18	45	70	-52
Asking questions	32	56	69	-37
Probing	11	27	43	-32
Recording answers	23	48	60	-37
Obtaining answers to sensitive questions	34	44	55	-21
Eliciting valid responses	36	45	53	-17
Establishing rapport	57	55	45	+12
Doing interviews punctually	19	33	48	-29
Reporting to supervisor	30	42	53	-23
Submitting forms promptly	24	45	53	-29

*"No answers" may reduce the base on individual items.

Comparative ratings

The clearest conclusion from the ratings is that indigenous interviewers tend to be rated lowest, and non-matched interviewers highest, on performance. Race-matched interviewers fall between the extremes. On some tasks, the performance of non-matched interviewers (generally, middle-class whites) is seen as overwhelmingly superior, particularly on tasks that are the technical core of the interviewing job -- following interview specifications, asking questions as they appear on the schedule, and recording answers. On these tasks, a sizable majority o study directors rate non-matched interviewers "very good," about half rate race-matched interviewers "very good," while one-fifth to one-third

rate indigenous interviewers "very good."

Of the 12 tasks specified in our questionnaire, non-matched interviewers are accorded highest ratings, and indigenous interviewers lowest ratings, on 10. On 6 of these tasks, non-matched interviewers receive "very good" ratings more than twice as often as indigenous interviewers. (See last column in table.)

The two tasks on which indigenous interviewers are not rated lowest are: establishing rapport with respondents (on which indigenous and race-matched interviewers are somewhat better-rated than are the non-matched), and locating "hard to reach" respondents (on which all three categories of interviewers are similar). They are also rated well, if not quite as high as others, on contacting respondents. The capacity to establish rapport with respondents of low socioeconomic status and to contact and track them down through informal neighborhood referrals are the perceived relative strengths of indigenous interviewers. (Data on survey completion rates show no significant difference between studies that used and did not use the indigenous.)

The differentiation in rating, it occurred to us, might be an artifact of rater bias. That is, study directors who employed indigenous interviewers might just happen to be tougher raters than other respondents. Therefore, we checked out this possibility by looking at the ratings for the 40 studies that used -- and rated -- all three categories of interviewers. Ratings for these studies showed that the same pattern held even when the same person rated all three categories. The differences, therefore, are not the product of rater differences but genuine perceptions of differential performance.

From the preceding table, we can derive estimates of the relative contribution of race-matching and class-matching to differentials in rating. That is, we can look at the differences in the ratings between indigenous and race-matched interviewers (who have common race/ethnicity characteristics) to see the effect that socioeconomic status has on ratings, and we can look at the differences in rating between race-matched and non-matched interviewers (who have roughly similar socioeconomic status -- although perhaps the race-matched are not quite as high), to see the effect that race/ethnicity has on ratings.*

*We thank Allen Barton for this suggestion.

The following table, based on the percentage of studies giving "very good" ratings, shows the percentage point differences between indigenous and race-matched, between race-matched and non-matched, and between indigenous and non-matched interviewers. (The last column is the same as the last column in the preceding table.)

On 7 of the 10 tasks for which non-matched interviewers are rated highest, about half the difference in rating appears to be associated with socioeconomic status and half with race/ethnicity. On the other three tasks, difference in socioeconomic status appears to account for about two-thirds of the deficit. These three tasks are: asking questions, recording answers, and submitting forms promptly.

Differences between Percentage of Studies Giving "Very Good" Ratings to Indigenous, Race-Matched, and Non-Matched Interviewers

	Percentage Point Difference		
Tasks	Indigenous to race-matched ("s.e.s. difference")	Race-matched to non-matched ("race/ethnicity difference")	Indigenous to non-matched ("s.e.s. and race/ethnicity difference")
Contacting proper respondents	- 5	- 4	- 9
Locating "hard to reach" respondents	- 3	+ 4	+ 1
Following interview specifications	-27	-25	-52
Asking questions	-24	-13	-37
Probing	-16	-16	-32
Recording answers	-25	-12	-37
Obtaining answers to sensitive questions	-10	-11	-21
Eliciting valid responses	- 9	- 8	-17
Establishing rapport	+ 2	+10	+12
Doing interviews punctually	-14	-15	-29
Reporting to the supervisor	-12	-11	-23
Submitting forms promptly	-21	- 8	-29

We can also see from this table where the advantages in rating arise. It is apparent that most of the advantage in establishing rapport is associated with race-matching (s.e.s. matching adds little), and that any advantage in locating the hard-to-reach derives from race-matching. It does not appear that similarity in status adds much.

An interesting sidelight revealed by the ratings is the lack of correspondence between high ratings on rapport and on validity. One of the current controversies in the interviewing literature is whether close rapport increases the validity of a respondent's answers (because he likes -- and therefore trusts -- the interviewer) or whether rapport leads to the kind of friendly, personal relationship in which a respondent is reluctant to divulge unseemly or unacceptable information, and thereby reduces the likelihood of valid response (Dohrenwend, Williams, Weiss 1969, Weiss 1970). Respondents to our questionnaire, as we have seen, rated indigenous interviewers highest on rapport but lowest on obtaining valid answers.

	Percentage rating interviewers very good		
	Indigenous	Race-Matched	Non-Matched
Rapport	57	55	45
Validity	36	45	53

Within interviewer categories, ratings on rapport and validity were not always close. Apparently, study directors do not see a one-to-one correspondence between the establishment of rapport and the validity of the answers received.

Another set of findings from the ratings has to do with the tasks on which study directors are most and least satisfied with interviewer performance -- whoever the interviewer. Trouble spots are: finding hard-to-reach respondents, probing inadequate or non-responsive answers, and completing assigned interviews punctually. On these tasks no interviewer group wins top ratings from a majority of study directors. On the other hand, substantial satisfaction is reported for all categories of interviewers regarding performance in: contacting the proper respondents and establishing rapport.

Mediating variable: experience

Although indigenous interviewers are generally rated lower than other interviewers, their ratings improve substantially when they have had previous experience in interviewing. We looked at ratings given to indigenous interviewers on those staffs where all or most of them had previous interviewing experience, and found that under these conditions they were much closer to (and in some cases, surpassed) the performance of race-matched and non-matched interviewer staffs.* Therefore, for many parts of the interviewing job, it is apparently lack of experience -- rather than ethnic and economic background -- that lowers the ratings. This is particularly true of the "work-habits" part of the job -- being punctual, reporting in, submitting forms -- where experienced indigenous interviewers are rated much more like the other categories of interviewers.

	Indigenous		Race-matched	Non-matched
Rated very good in:	Some, few or none experienced (N=69)*	All or most experienced (N=25)*	(N=112)*	(N=91)*
Contacting proper respondents	54%	68%	61%	65%
Locating hard-to-reach	34	46	41	37
Following interview specifications	15	32	45	70
Asking questions	27	44	56	69
Probing	3	33	27	43
Recording answers	16	40	48	60
Obtaining answers to sensitive questions	31	41	44	55
Eliciting valid responses	31	52	45	53
Establishing rapport	58	56	55	45
Doing interviews punctually	11	40	33	48
Reporting to supervisor	26	42	42	53
Submitting forms promptly	21	42	45	53

*"No answers" may reduce the base on individual items.

*We did not ask specifically about the previous interviewing experience of race-matched and non-matched interviewing staffs, and therefore our comparisons are between experienced indigenous on the one hand and race-matched and non-matched staffs that have varying degrees of experience on the other.

Experience also is associated with substantially better performance in the technical tasks of interviewing, namely following specifications, asking questions, probing, and recording answers. On these tasks, there are increases of 17 to 30 percentage points between inexperienced and experienced staffs. However, even experienced indigenous staffs are rated lower than race-matched and non-matched interviewers on three of these four task items. (The exception is "probing," on which they receive slightly better ratings than race-matched interviewers.)

There is only one item on which inexperienced interviewers receive the same ratings as experienced interviewers: establishing rapport with the respondent. The ability to relate to others is evidently viewed as an innate rather than a learned skill, and study directors tend to see interviewers who are similar to the respondent as "very good" at building rapport, whether or not they have previous experience in interviewing.

In terms of the validity of the answers they obtain, experienced indigenous interviewers are given a significant edge over their inexperienced counterparts. Their ratings are about the same as the highest-rated group, the non-matched (i.e. largely middle-class white) interviewers. But it should be noted that most study directors have no objective data on the validity of answers; their ratings are largely impressionistic.

Mediating variable: education

When we compare indigenous staffs that are composed of all or most high school graduates with those that have some, few, or no high school graduates, we find that educational level makes a difference. More education, like previous interviewing experience, is associated with better performance. But high school education, unlike experience, has no effect on work habits. High school graduate staffs and non-graduate staffs are rated much the same on punctuality, reporting to the supervisor, and submitting forms.

It is in their task performance as interviewers that high school graduate staff receive higher ratings. They are rated higher on

asking questions, obtaining answers to sensitive questions, and eliciting valid responses, and somewhat higher on probing and recording. (Again, as with experience, there is no difference in their ability to establish rapport.)

Schooling generally has less of an effect than experience on the job. The differences in ratings by education tend to be smaller than the differences between experienced and inexperienced indigenous staffs.

Rated very good in:	Indigenous Interviewers: Some, few, no high school graduates (N=38)*	Indigenous Interviewers: All or most high school graduates (N=50)*	Difference by education	Difference by prior experience
Contacting proper respondents	61%	53%	- 8	+14
Locating hard-to-reach	33	37	+ 4	+12
Following specifications	14	24	+10	+17
Asking questions	18	43	+25	+17
Probing	3	17	+14	+30
Recording answers	16	30	+14	+24
Obtaining sensitive information	20	41	+21	+10
Eliciting valid responses	21	43	+22	+21
Establishing rapport	59	57	- 2	- 2
Doing interviews punctually	16	19	+ 3	+29
Reporting to supervisor	29	31	+ 2	+16
Submitting forms promptly	26	24	- 2	+21

*"No answers" may reduce the base on individual items.

From the data, it appears that the major advantages of "indigenousness" are: (1) the capability to establish an effective relationship with respondents, and this ability is independent of prior experience or education, and (2) the ability to contact and locate respondents; these talents are somewhat improved by previous interviewing experience but <u>not</u> by high school education.

Other characteristics of indigenous interviewers

We looked at the assessment of indigenous interviewers' performance in terms of several other characteristics -- whether all or most of the staff were females, whether they had held previous white-collar jobs, whether they lived in the same neighborhood as the respondents, their race or ethnicity. These factors showed little relationship to ratings of performance.

Staffs that were mainly female were rated much the same as mostly male or mixed staffs. On only two tasks were there significant differences in rating (following interview specifications and recording answers), and the differences were non-linear: female staffs were less often rated "very good" but also less often rated "not too good." The same pattern appears, non-significantly, in ratings of several other tasks. There is a tendency for male staffs to be rated at the extremes, suggesting that it is to men, if anyone, that the adage applies: when they are good, they are very very good but when they are bad they are horrid.

Previous white-collar job experience was unrelated to satisfactory performance, as was holding another job at the time of employment. Neighborhood residence was not significantly related to performance. The small (non-significant) differences that appeared in the ratings favored neighborhood-resident staffs for contacting, locating, and rapport (the recurrently reported strengths of indigenous interviewers), but these staffs tended to be rated slightly lower on all other tasks.

Race/ethnicity made little difference. On only one task was there a difference in rating: mostly black staffs were rated higher in rapport than other indigenous staffs. Since few study directors or field supervisors generally observe rapport in the field, the suggestion is that they perceive race-matching as more effective for black respondents than for other groups.

Effects of study procedures

Training and supervisory procedures showed almost no relationship to performance assessments. No matter how long the training, how small the training group, how many practice interviews were assigned, what

the interviewer-supervisor ratio, whether the supervisors were experienced on studies of the poor or with indigenous interviewers, or what supervisory techniques were used, performance ratings of indigenous interviewers varied little. What differences there were favored the more "desirable" training and supervisory practices in only one case: number of practice interviews. When indigenous interviewers conducted three or more practice interviews, they tended to receive higher ratings on the technical aspects of interviewing. They were rated significantly higher on only one task, asking questions, but somewhat higher also on recording answers, getting answers to sensitive questions, establishing rapport, and following interview specifications. No other "good" training or supervisory practice was associated with better performance, and in fact, ratings were sometimes slightly lower when training was longer, the size of the training group was small, the interviewer-supervisor ratio was low, etc. The composite index for adequacy of training and supervision showed no relation to performance ratings. Nor did any relationship appear when we separated out experienced and inexperienced staffs, better and lesser educated staffs, etc. More intensive training and supervision was not associated with better performance for any subgroup.

The questionnaire did not ask for information on training and supervisory practices for other categories of interviewers, but we can assume that on studies in which they worked along with indigenous interviewers they received the same support. On this not unreasonable assumption, we examined the relationship between training and supervisory procedures and the assessments of performance for race-matched and non-matched interviewers.* For these interviewers, too, there was no relationship between the training or supervision variables and performance. Thus, whatever the import of the findings, it appears to apply not only to the indigenous but to all interviewers.

This counter-intuitive finding is difficult to explain. Perhaps in the complex conditions of field surveys, so many factors affect interviewer performance (and supervisors' ratings) that specific training

*Because they also had indigenous interviewers, 55 studies with race-matched and 42 studies with non-matched interviewers answered the training and supervision questions.

practices are overwhelmed. Perhaps the quality of training and supervision rather than the quantitative aspects that we examined are crucial. It may be less what study directors do than how they do it that affects indigenous interviewers' performance. There is some support for this view in the fact that study directors' satisfaction with their training and supervisory practices was associated with higher assessments of indigenous interviewers. Studies that reported that training and supervision worked well were significantly more likely to give high performance ratings.

The difficulty of the interview shows a modest association with interviewer performance. Ratings of interviewers tend to be somewhat higher when the interviewing job is more complex. On only two tasks are differences in rating significant, but what variations there are show higher ratings when interviews are long, questions unstructured, the interview format complex, and many sensitive topics are included. The extent of training and supervision provided for difficult interviews is not an explanation, since training and supervision was no more comprehensive when interviews were demanding and the amount of training and supervision was not related to performance ratings. But part of the explanation is that better qualified indigenous interviewers (in terms of education and experience) tended to do more difficult interviews.

Interestingly, the same pattern of difficult interviews-better performance tends to hold for race-matched interviewers as well. There is a consistent pattern of more favorable assessments as the difficulty of interview increases; ratings reach statistical significance on 2 out of the 12 tasks rated (the same frequency as with indigenous interviewers). For non-matched interviewers there was smaller and less consistent association between performance and difficulty.

The absolute number of indigenous interviewers on staff had no effect on their performance ratings. However, the proportion of the staff that was indigenous was a factor. When indigenous interviewers comprised 30% or less of the interviewing staff, ratings of their performance tended to be lowest.

Another study variable is the mode of approach which indigenous interviewers were trained to use, i.e. whether training advocated a warm and friendly approach or a cool and detached approach to the respondent. Our questionnaire posed those two alternatives, but for a sizable number of studies (22), the interviewer training was reported as promoting a blend of styles, usually described as "friendly but detached" or "friendly and businesslike." Looking at assessment of indigenous interviewer performance by the mode of approach stressed in training, we find a few differences in satisfaction. The studies that trained interviewers to be warm and friendly and those that trained interviewers to be friendly and businesslike were about equally satisfied with the way their indigenous interviewers handled the technical tasks of the interview. However, the "friendly and businesslike" studies were significantly more satisfied with interviewers' work habits (doing interviews punctually, reporting to the supervisor, submitting forms) and their contacting ability (contacting proper respondents, locating the hard-to-reach). The stress on being businesslike does not appear to make much difference in relationships with the respondent, but it apparently helps to improve attention to the "business" tasks of interviewing.

There were 11 studies that reportedly trained interviewers to be "cool and detached." Although the number is too few to support much generalization, these studies were least satisfied with interviewer performance on all assessment items. None of these 11 studies rated their interviewers "very good" on following interview specifications, asking questions, probing, recording answers or getting answers to sensitive questions, and no more than two of them rated indigenous interviewers "very good" on any other task. Apparently the special qualities of indigenous interviewers that enable them to establish rapport with their fellows is incompatible with a cool and detached style of interviewing.

Another factor in the situation is the time at which the interviewing was done. The studies divide fairly evenly between those done in 1968 or 1969 and those done in 1970 or 1971. It might be supposed that the later studies, those in the seventies, had more opportunity

to benefit from previous experience with low-income respondent groups and thus were better satisfied with interviewer performance, but this was not so. Four indices of interviewer performance were constructed from the ratings, and the proportion of studies with "high" index scores tended to drop from '68 and '69 to '70 and '71. The percentages of studies giving high scores were:

Interviewer performance index and type of interviewer	Year field work began 68, 69	70, 71	Difference
Contact (2 items)			
Indigenous interviewers	54%	41%	-13
Race-matched interviewers	61	45	-16
Non-matched interviewers	58	44	-14
Interviewing technique (4 items)			
Indigenous interviewers	33	22	-11
Race-matched interviewers	63	43	-20
Non-matched interviewers	78	59	-19
Respondent cooperation (3 items)			
Indigenous interviewers	54	36	-18
Race-matched interviewers	54	41	-13
Non-matched interviewers	58	41	-17
Work habits (3 items)			
Indigenous interviewers	26	31	+ 5
Race-matched interviewers	50	47	- 3
Non-matched interviewers	67	50	-17

Satisfaction with all categories of interviewers declined, although the differences fell short of statistical significance. The indigenous lost no more ground, perhaps a little less, than other interviewers. They are the only category, in fact, with any positive change (on work habits).

Thus, while the order did not change (non-matched interviewers were still generally rated highest and indigenous interviewers lowest), the gaps tended to narrow on work habits and interviewing technique. We can only speculate about the reasons for the fall-off in satisfaction, because none of the available information accounts for these differences (e.g. type of research organization, topic of study, previous experience with surveys of the poor). Perhaps study directors' expectations have risen faster than interviewer performance. Or perhaps they have dimmer memories of earlier studies; with the passage of time, they may have

forgotten or discounted the negative experiences which are more vivid on recent studies. Such selective memory may be elevating the ratings for studies of the sixties.

There is one other small but consistent pattern in the assessment data that may be worth noting. The farther removed from the field experience the person who answered our questionnaire, the higher the ratings he gave of interviewer performance. Thus, study directors gave slightly higher ratings than field supervisors, and field supervisors who did not observe interviewer performance in the field gave higher ratings than supervisors who did. This is true not only for indigenous interviewers; the difference between study directors and field supervisors also holds for race-matched and non-matched interviewers. Interestingly, one task with sizable differentials for all three types of interviewers is "recording answers." The less immersed the rater is in field operations, the more satisfied he is with the data he receives.

Effect of intent

About half the studies with indigenous interviewers had purposely recruited them and the other half employed them without predetermined intent. Comparison of the two groups showed small differences in performance ratings, with those who purposely sought indigenous interviewers giving higher ratings on eight of the 12 tasks. While the differences are not statistically significant, the largest differentials are in the direction of higher ratings by studies that sought indigenous interviewers, and appear on tasks that are consistently viewed as the basic rationale for using racially and economically similar interviewers: establishing rapport (64% of the "sought" group and 51% of the "did not seek" group rated interviewers very good), contacting proper respondents (64% of the "sought" and 45% of the "did not seek" rated interviewers very good), and locating the hard-to-reach (43% compared to 33%).

When studies reported that they had purposely recruited indigenous interviewers <u>because</u> they expected an advantage in establishing rapport or locating the hard-to-reach, differences were larger. Thus,

of studies that sought indigenous interviewers specifically for their ability to establish rapport with respondents, 75% rated interviewers very good on this task, compared to 47% that had no expectations regarding rapport. There is some tendency for assessments to confirm expectations, either because of a self-fulfilling prophecy or because the expectations were grounded in conditions and earlier experience that justified them.

PLANS FOR THE FUTURE

The future

We asked researchers:

> If you were starting field work today to survey a low-income population, would you want to select interviewers similar to respondents in any of the following ways?
>
> race/ethnicity
> socioeconomic status
> neighborhood of residence

The answer options on the questionnaire were "yes," "no," and "not necessarily."

A large majority of the researchers said "yes" to matching by race/ethnicity; 78 per cent of them believe this procedure should be followed. Another 20 per cent said "not necessarily," and 2 per cent said "no."

Regarding similarity in socioeconomic status, 24 per cent said yes, 65 per cent said not necessarily, and 12 per cent said no. This is a substantially lower commitment; fewer than a third as many of our respondents propose matching by socioeconomic status as a matter of course compared to matching by race. Twelve per cent are flatly opposed to the procedure.

In response to the question on selecting interviewers who live in the same neighborhoods as the respondents, 41 per cent say yes, 9 per cent say no, and 50 per cent say not necessarily. This question probably is not applicable to all surveys; if respondents are widely dispersed rather than concentrated in particular neighborhoods, neither the utility nor the feasibility of same-neighborhood interviewers is obvious. Nevertheless, residence matching has more adherents than matching by socioeconomic status.

Relation between practice and future recommendations

Which are the studies that recommend using interviewers similar to low-income or minority-group respondents? There is one striking characteristic that distinguishes them: they are the studies that deliberately recruited matched interviewers on the current study. Thus, of studies that purposely matched by race, 85% propose race matching in the future as a matter of course, compared to 56% of

those which did not. On s.e.s., 53% of studies that deliberately sought to match by s.e.s. would unconditionally do so again, compared with 14% of those which did not. On residence, 63% of those that sought neighborhood residents as interviewers would do so again, compared to 21% which did not. (All these relationships are significant at the .001 level.)

Matching by design was critical. As noted previously, about half the studies that hired indigenous interviewers (i.e. similar in both race/ethnicity and s.e.s.) did so without deliberate intent. This group of studies was hardly more likely to propose s.e.s. matching in the future than were studies that used no indigenous interviewers. It is the studies that had both experience and intent that are the advocates of employing interviewers similar in status to low-income respondents (although even among this group there is a fall-off in commitment).

	Indigenous interviewers were:		
Would want to select interviewers similar in s.e.s.	Sought, obtained	Not sought, but obtained	Not sought, not obtained
Yes	53%	15%	13%
Not necessarily	45	74	70
No	2	11	17
	100% (47)	100% (53)	100% (89)

N = 189
NA = 5
194

For residence matching, too, the studies that obtained neighborhood residents as interviewers without seeking them were barely more likely to want to employ them again than studies that did not employ them. Twenty-three per cent of the studies that did not seek but obtained neighborhood residents would select them in the future, compared with 20% of those that neither sought nor obtained them.

We can also look at the proportion of interviewers who were similar to respondents in socioeconomic status and see whether the extent of experience is related to future plans to match. As the following table

shows, when most of the interviewers were of low socioeconomic status, directors of the studies were significantly more likely to want to match in the future.

Would want to select interviewers similar in s.e.s.	Percentage of indigenous interviewers on staff 1-30	31-60	61-90	91-100
Yes	15%	18%	54%	41%
Not necessarily	75	76	38	55
No	10	6	8	4
	100%(20)	100%(17)	100%(24)	100%(22)

N = 83
NA = 19
102

However, as we saw earlier, there is a strong relationship between the intent to match and the proportion of interviewers who are matched. When we analyze the independent effects of each of these variables on future plans, the number of cases in the cells becomes small, but it is apparent that each is associated with higher advocacy of matching.

Would want to select interviewers similar in s.e.s.	Sought and obtained indigenous: Indigenous 1-60% of staff	Sought and obtained indigenous: Indigenous 61-100% staff	Did not seek but obtained indigenous: Indigenous 1-60% staff	Did not seek but obtained indigenous: Indigenous 61-100% staff
Yes	29%	56%	13%	27%
Not necessarily	71	41	77	55
No	-	3	10	18
	100%(7)	100%(34)	100%(30)	100%(11)

N = 82
NA = 20
102

It seems reasonable to expect that studies that rated the performance of matched interviewers high would be more likely to advocate employing them in the future. This tends to be true, but the differences

are not statistically significant. We constructed an overall assessment index out of the ratings on the 12 interviewing tasks for indigenous and for race-matched interviewers. Comparing the composite assessment scores with future plans we find a tendency for studies that rated interviewers high to advocate matching in the future. But again intent is

Would want to match by s.e.s.	Assessment Index for Indigenous Interviewers		
	High	Medium	Low
Yes	41%	36%	21%
Not necessarily	50	64	68
No	9	-	11
	100%(34)	100%(28)	100%(28)
			N = 90
			NA = 12
			102

Would want to match by race	Assessment Index for Race-Matched Interviewers		
	High	Medium	Low
Yes	88%	82%	67%
Not necessarily	10	18	33
No	2	-	-
	100%(48)	100%(28)	100%(21)
			N = 97
			NA = 15
			112

a factor. Studies that deliberately recruited matched interviewers were somewhat more likely to rate them high, and intent accounts for part of the difference in advocacy.

Which facets of the interviewers' performance were most strongly related to the desire to match on a future study? For race-matched interviewers, high ratings on three tasks were significantly associated with the desire to recruit race-matched interviewers again: contacting, rapport, and locating hard-to-reach respondents. When race-matched interviewers were rated very good on these tasks, study directors were more likely to plan to match by race again. No task rating showed

significant relationship to future plans for indigenous interviewers, but the largest percentage differences appeared for locating the hard-to-reach, contacting, and obtaining answers to sensitive questions. When indigenous interviewers were rated very good on these tasks, there was a tendency for study directors to plan to match by socio-economic status in the future. Thus, when matched interviewers do well on the tasks that they are expected to excel at, adherence to matching tends to increase.

No other variables were significantly associated with future plans. The date of the survey had little bearing on the desire to recruit matched interviewers in the future. Whether the field work was conducted in the late sixties or early seventies, responses to the questions on matching by race, residence, and status were similar. No time trends are in evidence.

Matching interviewers to respondents on the present study appears to be the best predictor of future intentions. Adherents of matching, particularly with regard to indigenous interviewers, appear to have a commitment to the practice that is in part independent of the nature of their experience. But more extensive experience and more satisfactory experience tend to increase commitment to matching in the future.

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